ePM Project Access Report Quick App

What is ePM Project Access Report Quick App?

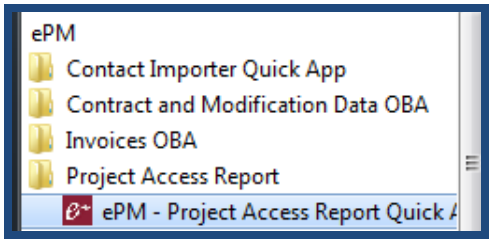
The Project Access Report is a utility that will provide GSA the ability to document the Security Categories of all Exported Team Members to the ePM Projects (team members with email addresses). When a user runs this utility, TXT reports will be generated and output to the user's local machine and/or attached to the ePM project properties page, based on criteria selected.

Who Will Use This?

- ✓ System Admin
- ✓ Regional Admin

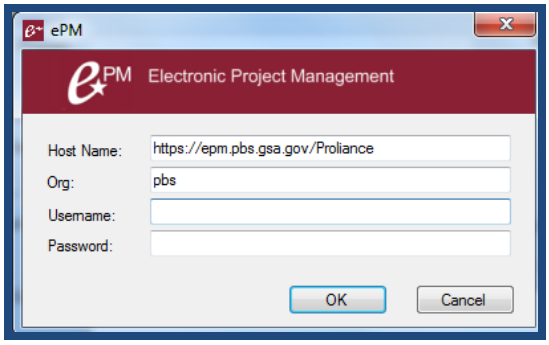
Accessing the Utility

1. Open the **Project Access Report Quick App** by going to Start > Programs > ePM > Project Access Report > Project Access Report Quick App.
   **HINT* You can also create a desktop shortcut to the Quick App.*



   The **Quick App Log On Dialog** box displays.

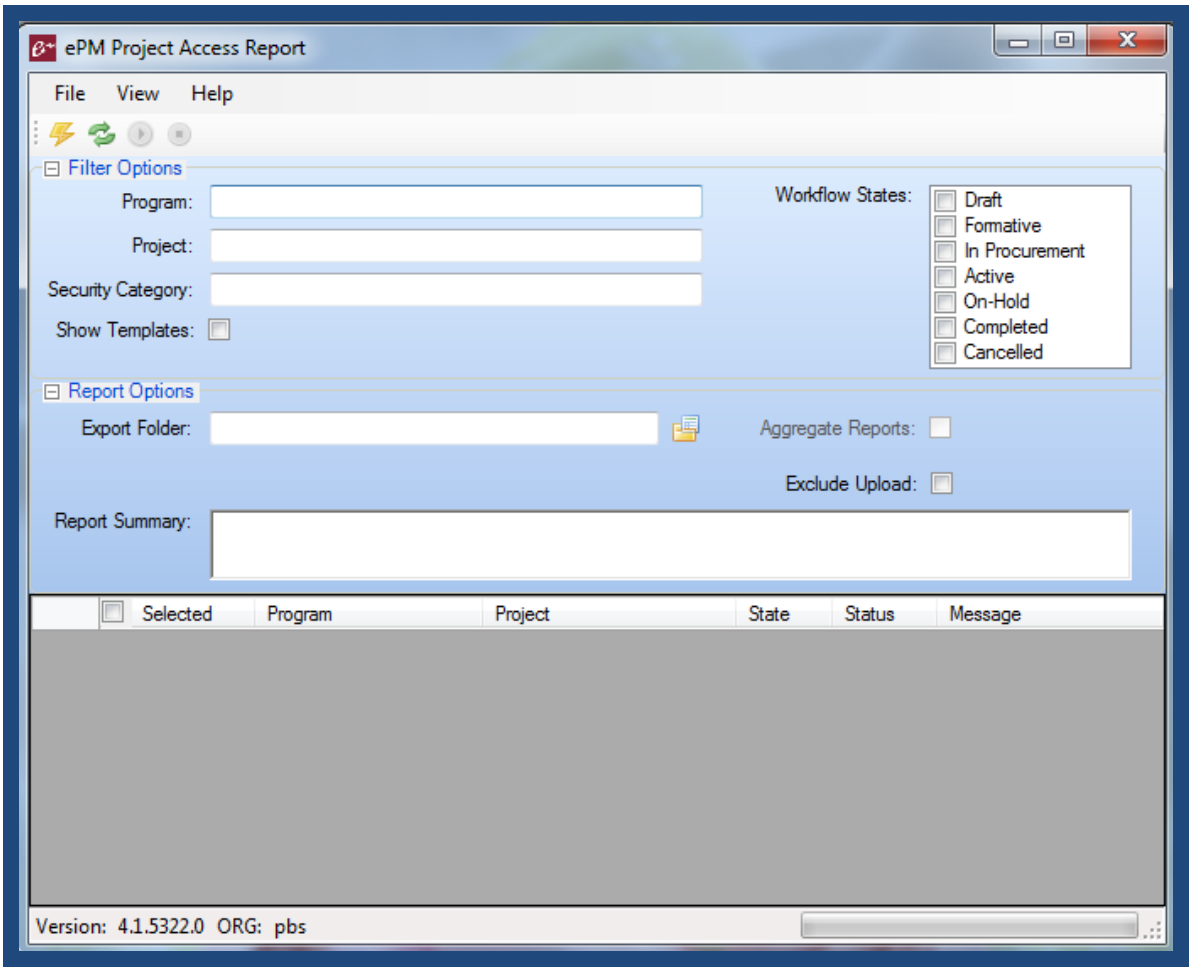
2. Enter log on credentials:
   a. In the "**Host**" field, enter **https://epm.pbs.gsa.gov/Proliance**
   b. In the "**Org**" field, enter "**pbs**"
   c. Then enter your "**Username**" and "**Password**" credentials.



Accessing the Utility, cont.

3. After successful log on, the blank form is displayed.

4. To display projects in the grid for inclusion in the report(s), click the '**Query for data**' icon . Reference next sections for filter and report options and how to run the reports.



Filter Options

Filter Options allow the user to narrow the list of projects displayed in the project selection grid.

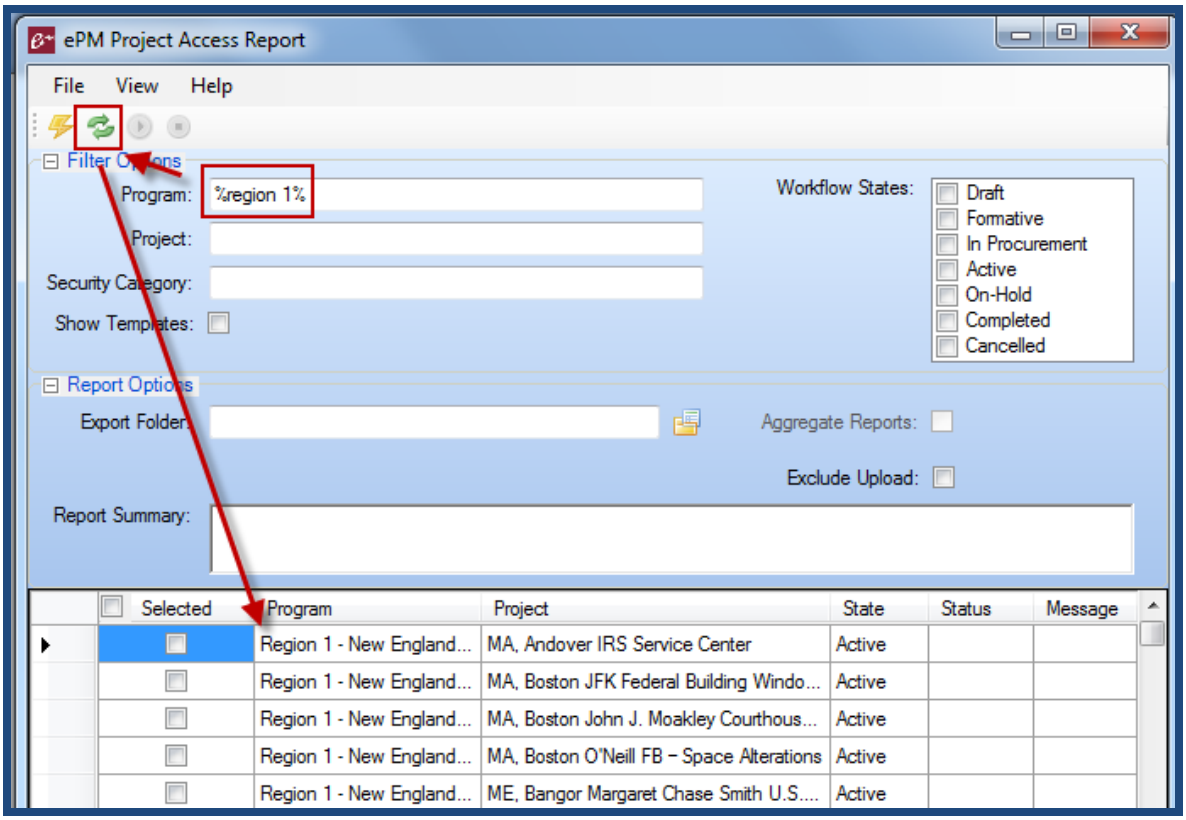
- Use the % sign as the wild card character to search for text within a field.
  For example, if you want all projects for Region 1, enter **%region 1%** in the Program field.

  Notes on the use of the wild card character:
  - If you do not use a '%' then the query will for search for an exact match (**Equals**) to the text entered in the field.
  - To search for projects that '**Contains**' particular text (such as courthouse), then you need to surround your text – i.e. %courthouse%
  - To search for projects that '**Starts with**' particular text (such as courthouse), place % at end, i.e. courthouse%
  - To search for projects that '**Ends with**' particular text (such as courthouse), place % at beginning, i.e. %courthouse

- Filter options include:
  - **Program:** Filter can be used to find projects based on criteria for the Program Name.
  - **Project:** Filter can be used to find projects based on criteria for the Project Name.
  - **Security Category:** Filter can be used to find projects based on criteria for the Security Category name. Query results will display a project if the specified category is assigned to a contact in the project even though the user for that category may not have an email address and not populate in the report.
  - **Show Templates:** If selected, template projects display in the project selection grid.
  - **Workflow State:** Filter for projects based on workflow state.

Steps:

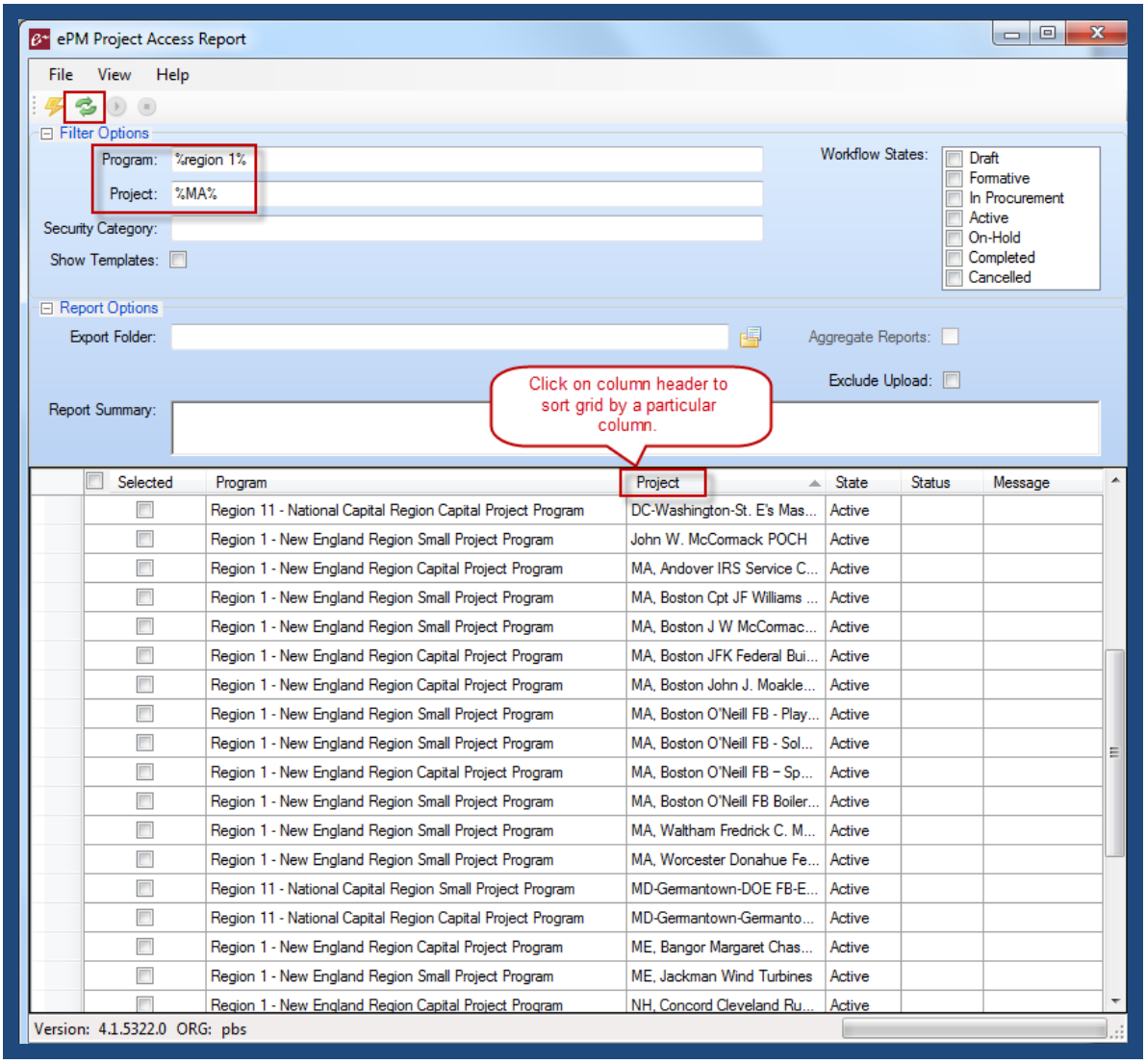
1. Enter or select filter criteria, and then click the click the '**Query for data**' icon on the Project Access Report toolbar.
   Note: If no filter criteria is entered, then all projects displays.
2. The grid will now display a list of projects based on any filter criteria entered or selected.



3. To enter multiple filter criteria:
   a. Enter values for each filter criteria.
   For example, if you need reports for **Region 1** and projects in **Massachusetts**, enter **%region 1%** in Program Name, and **%MA%** in Project Name.
   Note: If you want projects that start with MA, then you would enter **MA%** in the Project Name.

   b. Then click the click the 'Query for data' icon located in the ePM Project Access Report toolbar. Grid will display projects based on filter criteria.

   Tip: Click on column header to sort grid by a particular column.


ePM Project Access Report
File View Help
Filter Options
Program: %region 1%
Project: %MA%
Security Category:
Show Templates:
Workflow States:
Draft
Formative
In Procurement
Active
On-Hold
Completed
Cancelled
Report Options
Export Folder:
Aggregate Reports:
Exclude Upload:
Report Summary:
Click on column header to sort grid by a particular column.
Selected
Program
Project
State
Status
Message
Region 11 - National Capital Region Capital Project Program
DC-Washington-St. E's Mas...
Active
Region 1 - New England Region Small Project Program
John W. McCormack POCH
Active
Region 1 - New England Region Capital Project Program
MA, Andover IRS Service C...
Active
Region 1 - New England Region Small Project Program
MA, Boston Cpt JF Williams ...
Active
Region 1 - New England Region Small Project Program
MA, Boston J W McCormac...
Active
Region 1 - New England Region Capital Project Program
MA, Boston JFK Federal Bui...
Active
Region 1 - New England Region Capital Project Program
MA, Boston John J. Moakle...
Active
Region 1 - New England Region Small Project Program
MA, Boston O'Neill FB - Play...
Active
Region 1 - New England Region Small Project Program
MA, Boston O'Neill FB - Sol...
Active
Region 1 - New England Region Capital Project Program
MA, Boston O'Neill FB - Sp...
Active
Region 1 - New England Region Small Project Program
MA, Boston O'Neill FB Boiler...
Active
Region 1 - New England Region Small Project Program
MA, Waltham Fredrick C. M...
Active
Region 1 - New England Region Small Project Program
MA, Worcester Donahue Fe...
Active
Region 11 - National Capital Region Small Project Program
MD-Germantown-DOE FB-E...
Active
Region 11 - National Capital Region Capital Project Program
MD-Germantown-Germanto...
Active
Region 1 - New England Region Capital Project Program
ME, Bangor Margaret Chas...
Active
Region 1 - New England Region Small Project Program
ME, Jackman Wind Turbines
Active
Region 1 - New England Region Capital Project Program
NH, Concord Cleveland Ru...
Active
Version: 4.1.5322.0 ORG: pbs

Report Options

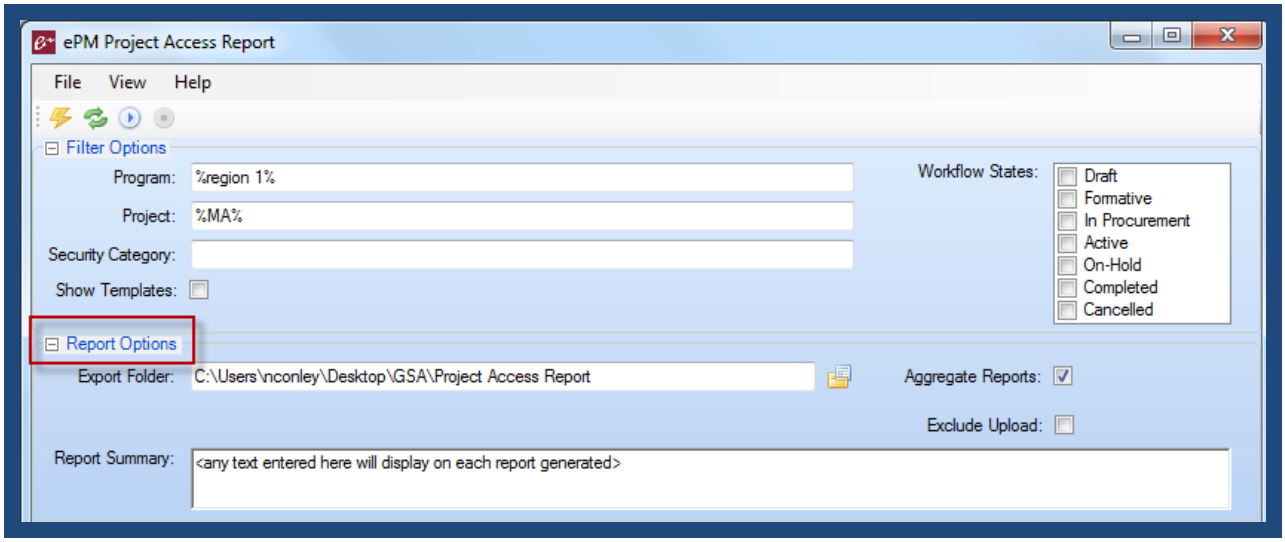
Report Options will allow the user to designate how the reports should be produced and where the report output should be placed.

- Report Options include:
  - **Export Folder:** Output location for reports to be saved to user's local machine. Selecting an output location will provide individual reports for each project selected.
  - **Aggregate Reports:** Only available if Export Folder has been designated. This option will provide one combined report for all projects selected.
  - **Exclude Upload:**
    - If selected, the report(s) will only be generated to the Export folder designation and not attached to the Project Properties document in ePM for the projects selected.
    - If not selected, the report(s) will be attached to the Project Properties document in ePM for the projects selected.
  - **Report Summary:** User enters summary information to be displayed for each report (aggregate and individual reports). This information will be printed on every report generated at the top of the report(s).

- If no report options are selected at all, then individual reports are generated for each project selected and attached to the Project Properties document in ePM.

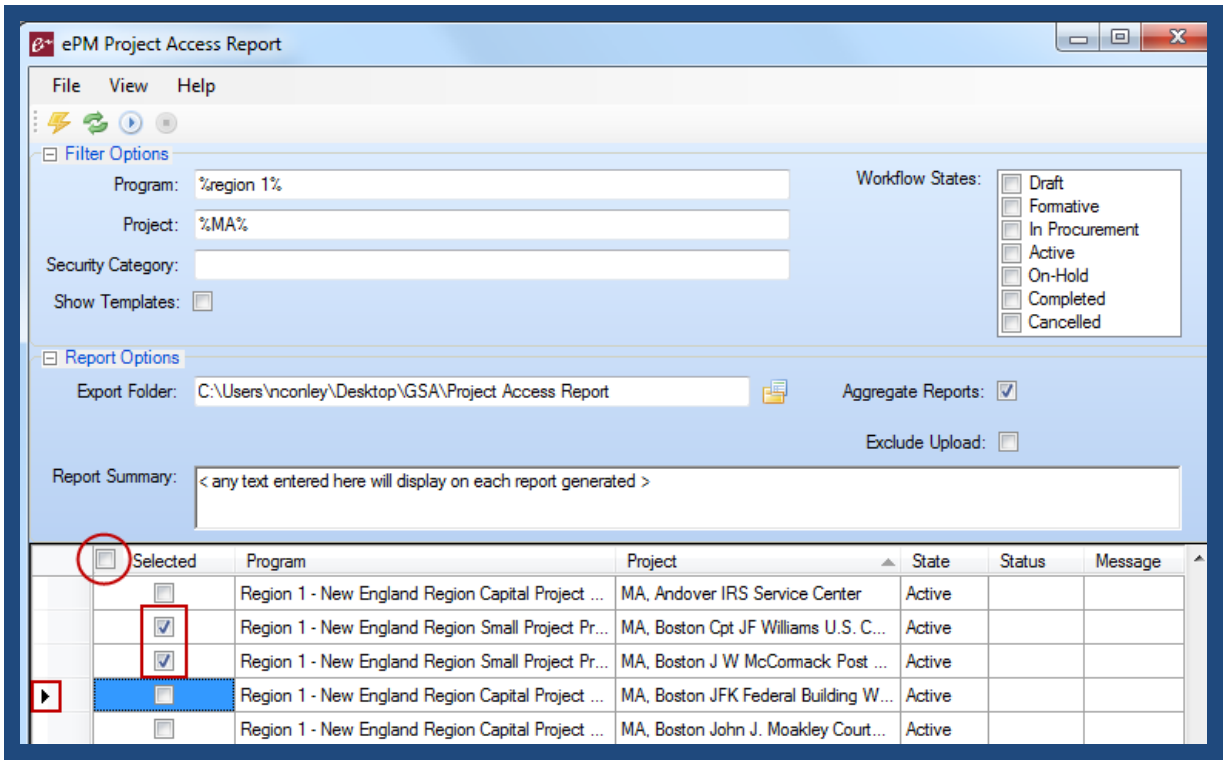
Steps:

1. Select options based on definitions above.

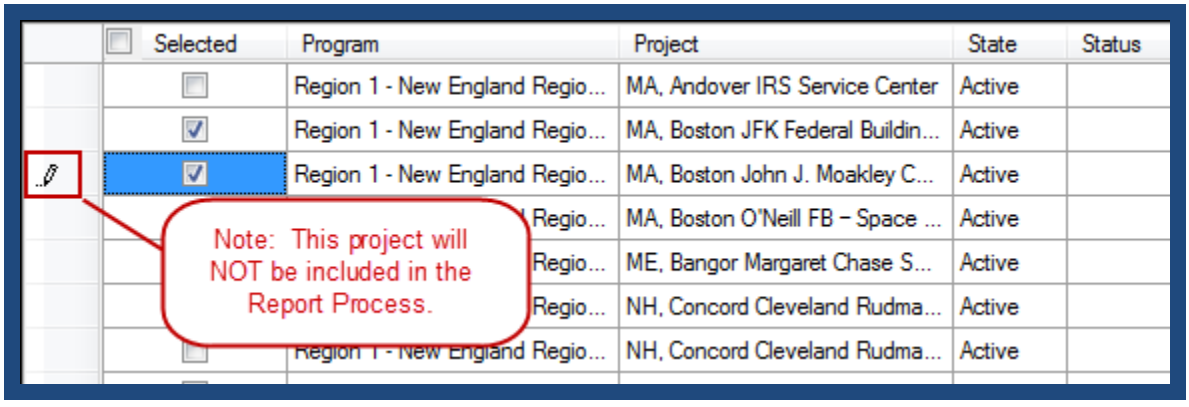


Run Report(s)

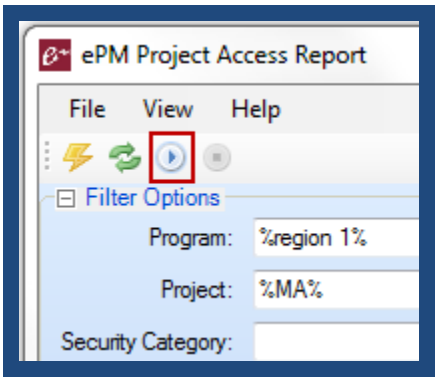
1. Once projects display in the grid, select the project(s) to be included in the report by placing a checkmark in the **Selected box**. (Click in the Selected box)
   Note: You can select all projects in the grid by clicking in the **Selected box** in the column header.



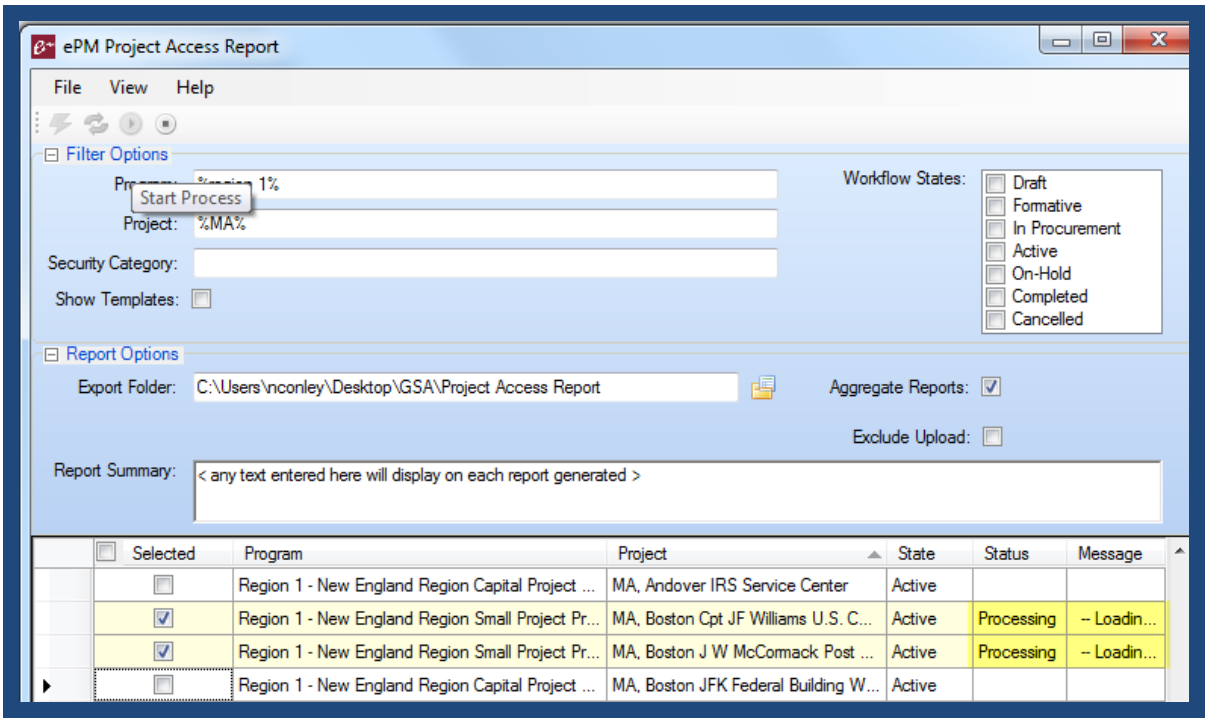
Important: When selecting multiple projects, make sure to click out of the last row selected. The last row must have a right-triangle to the left of the **Selected column**. See screen shot above. If the last row contains a pencil icon, then that row has not been committed to be included in the process.



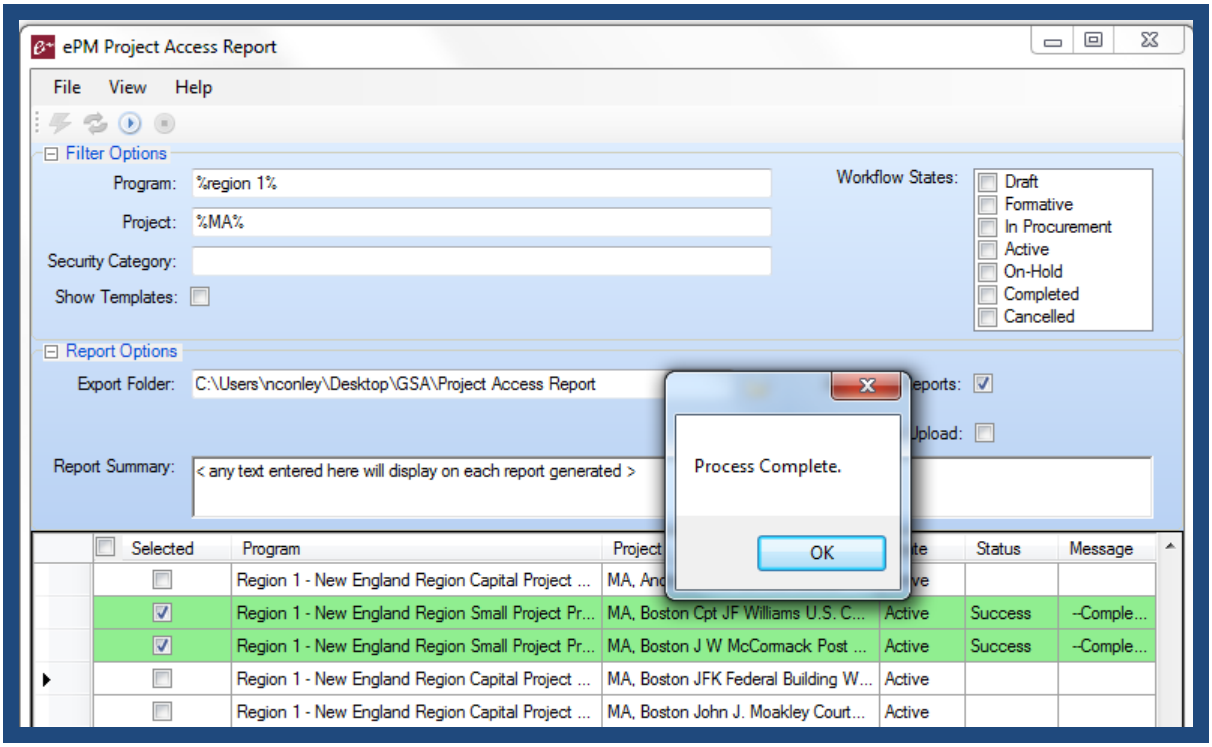
2. To begin report generation, click the **Start Process icon** located on the ePM Project Access Report toolbar.



3. Status of the Report Process will display in the **Status** and **Message** columns of the grid and updated as the data is being generated for each selected project.



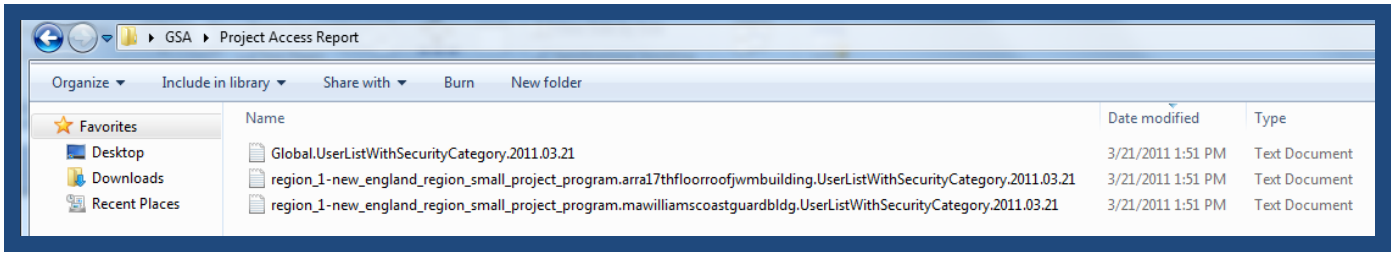
4. Once process is complete, User will receive a '**Process Complete**' dialog and each project row will be updated with **Status** and **Message**.
5. Click OK.



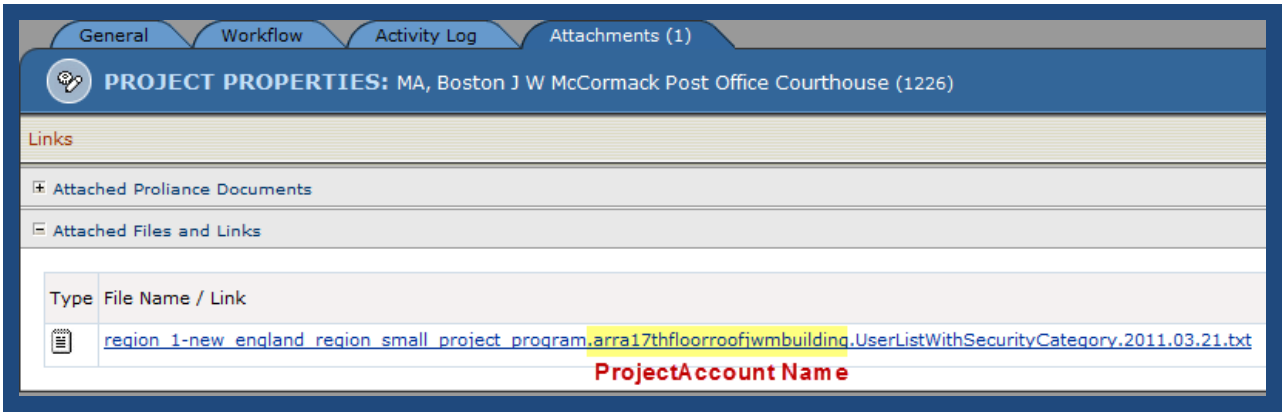
6. Reports are generated in **TXT** format with the following naming convention:
   a. **Aggregate Reports**:
      Global.UserListWithSecurityCategory.YYYY.MM.DD

   b. **Individual Project Reports**:
      ProjectAccountName_UserListwithSecurityCategory_YYYY.MM.DD

7. Report output location(s) are based on the Report Options.
   a. If **'Export Folder'** was designated:
      Browse to location on user machine.
      Below is an example of an aggregate report request that included two projects.

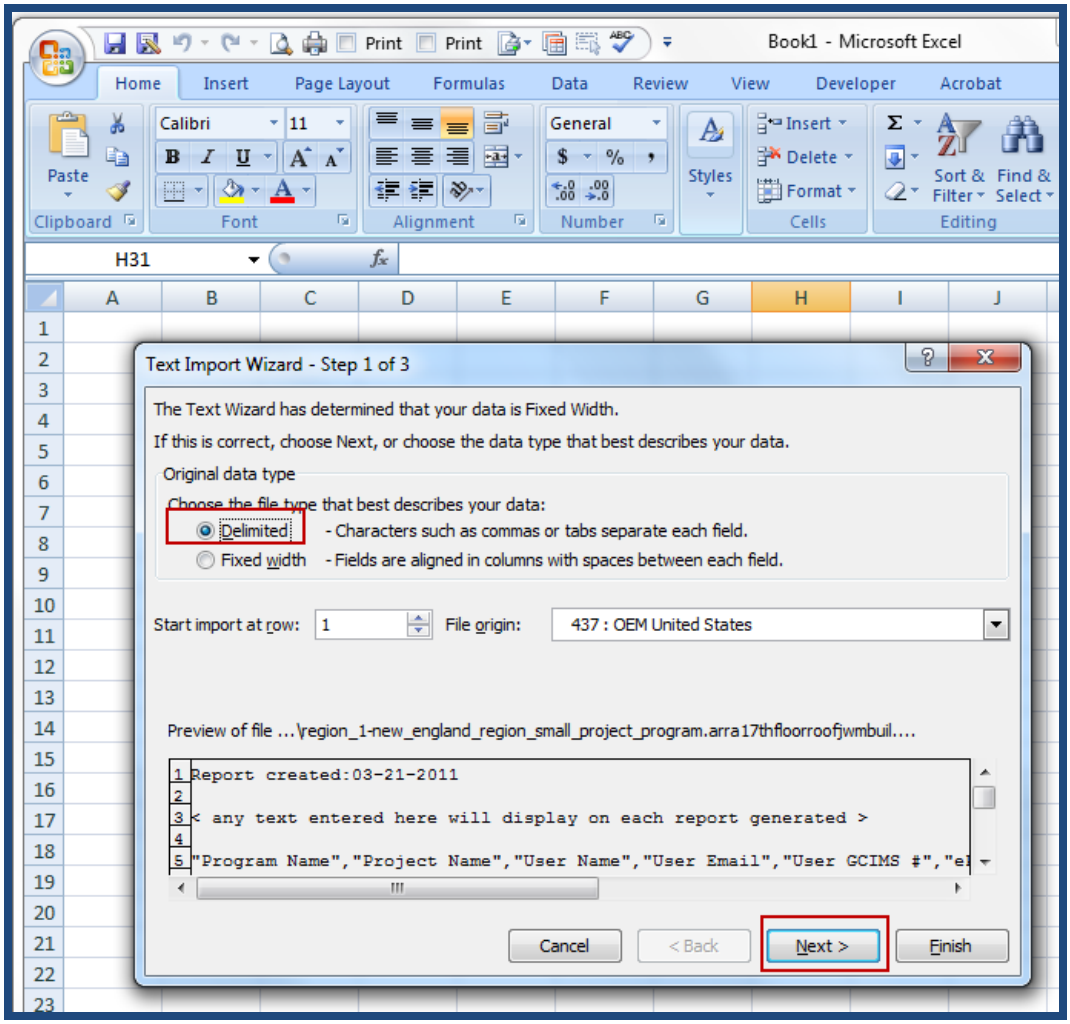


b. If '**Export Exclude Upload**' was not selected: Go to the Project Properties Document in the Project Workspace for a project that was selected in the report generation process.

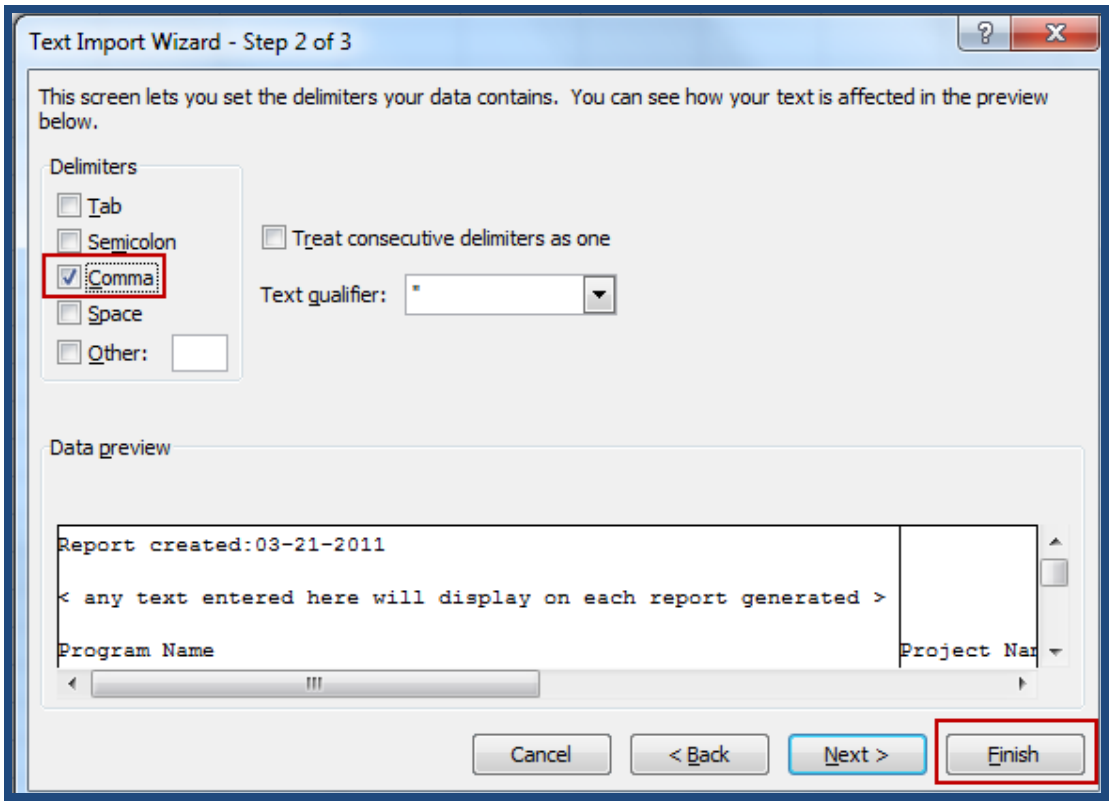


View Report(s)

1. To **Open/View** Data in Excel:
   a. **Launch Excel**, click **Open** and select the **TXT** file.
   b. Text Import Wizard, Step 1, select '**Delimited**'.
   c. Click **Next**.



   d. Text Import Wizard, Step 2, select '**Comma**' delimiter
   e. Click **Finish**.
   f. Data populates in appropriate columns in Excel.

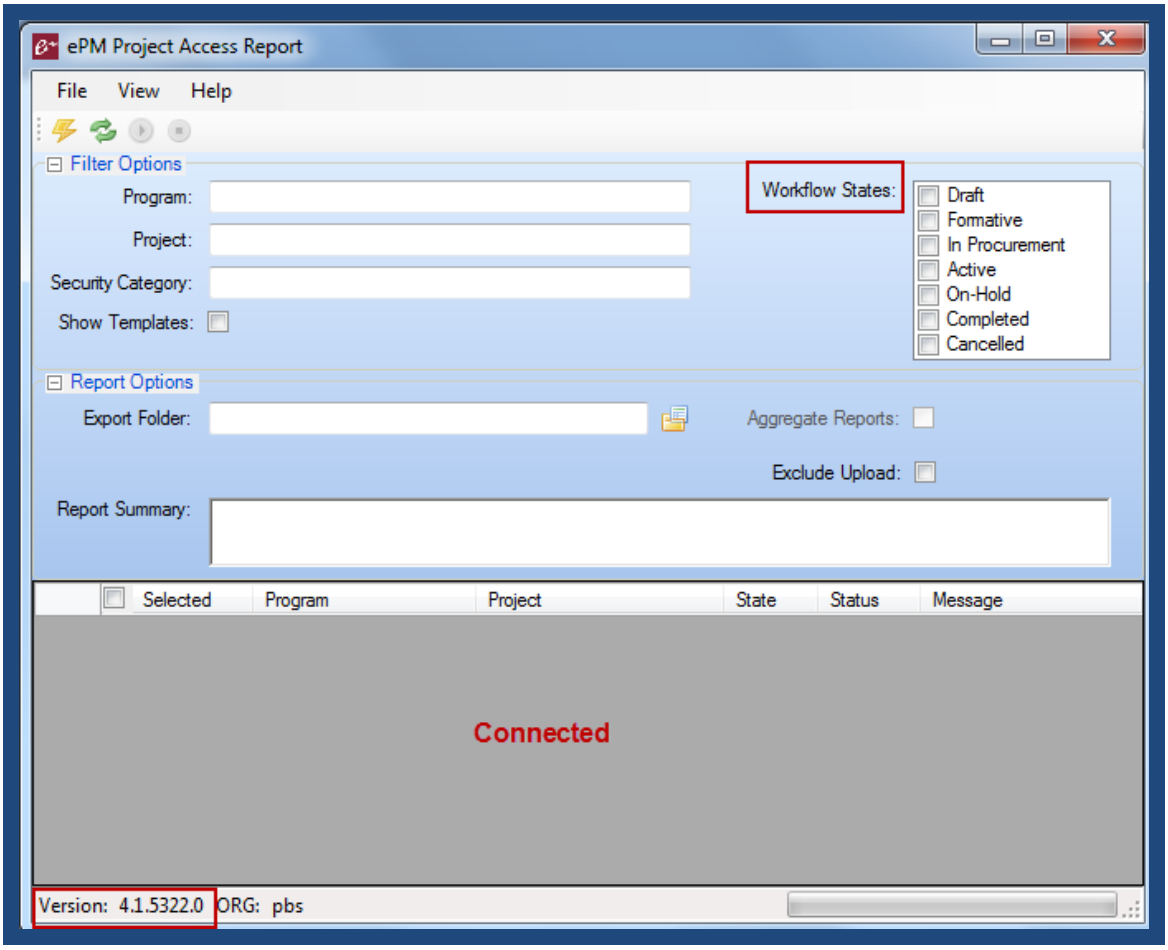
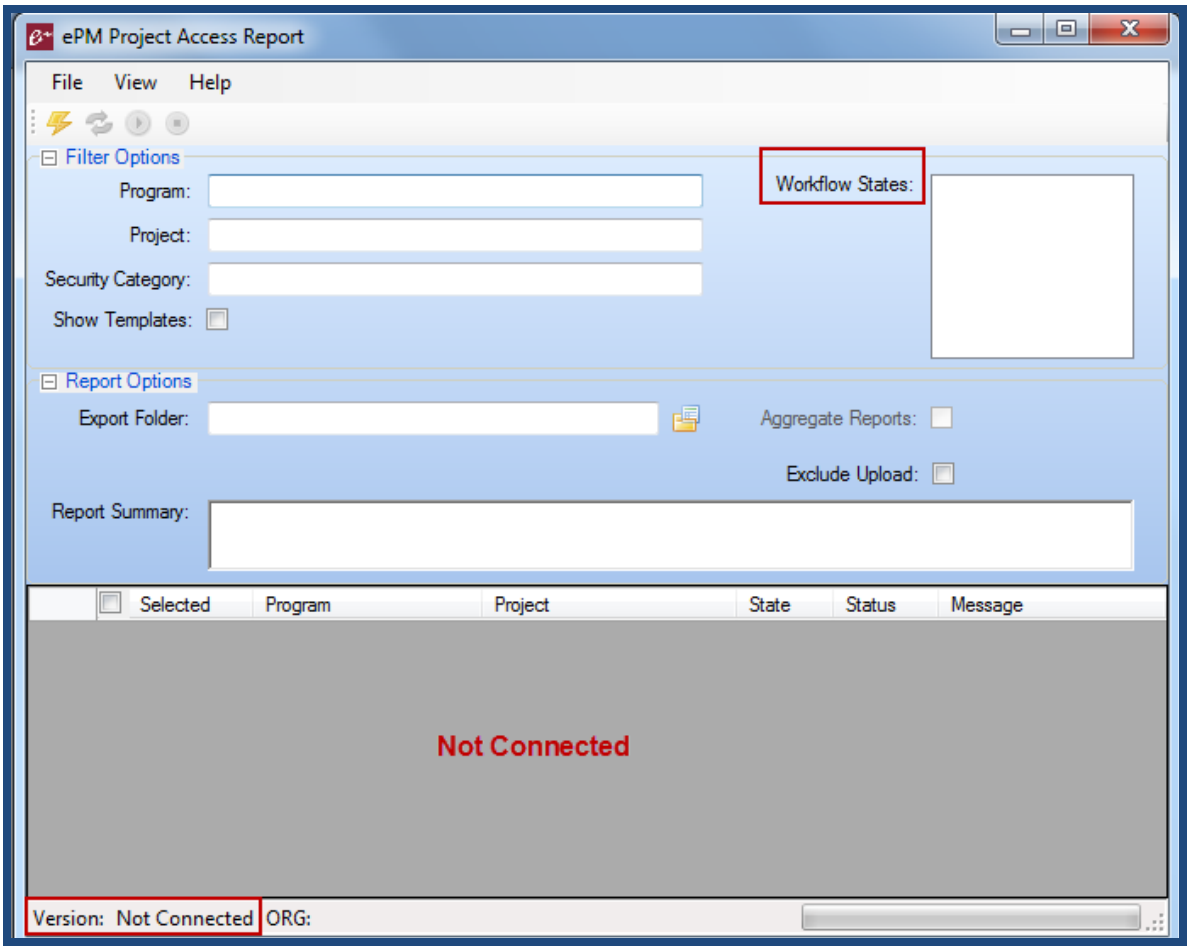

Text Import Wizard - Step 2 of 3
This screen lets you set the delimiters your data contains. You can see how your text is affected in the preview below.
Delimiters
Tab
Semicolon
Comma
Space
Other:
Treat consecutive delimiters as one
Text qualifier:
Data preview
Report created:03-21-2011
< any text entered here will display on each report generated >
Program Name
Project Nar
Cancel
< Back
Next >
Finish

Tips

1. In the project selection grid, click on column header to sort grid by a particular column.

2. You can select all projects in the project selection grid by clicking in the Selected box in the column header.
   Note: If there are a large number of projects, the user may experience a slight delay when selecting/deselecting.

3. The version in the bottom left hand corner is the version of ePM. This is how the user knows they have connected to ePM.



If user launches the utility but is not connected to ePM, the workflow states will be blank and version in the bottom left hand corner indicates '**Not Connected**'.